

Section 3.4 OPTIONS MENU

Security - Define Roles

| | |
|-------------|---|
| Purpose | <p>This section provides the procedures for a Department or Statewide Security Administrator to create, update and copy a role in DCDS by using the Define Roles window. Each employee is assigned a role or multiple roles. The role(s) specify which functions can be performed by the user. Users are able to copy centrally defined roles and modify them to meet their agency's requirements. Examples of a role include a timekeeper, certifier or releaser. Each role consists of a group of functions, any of which may be deleted for that user.</p> |
| Window Name | Define Roles |
| Reminders | <ol style="list-style-type: none">1. The Define Roles window is accessed through the <u>O</u>ptions, <u>S</u>ecurity, <u>D</u>efine <u>R</u>oles window.2. The Define Roles window allows a user to create agency specific roles or to copy a role along with its associated functions. The Define Roles window consists of the following tabs:<ul style="list-style-type: none">■ Selection - Allows a user to enter the specific selection criteria to add, change or delete roles. The Selection tab is the first tab displayed and consists of a Selection Criteria window and a Selection List window. Once the appropriate Selection Criteria is entered and the Select button clicked, the remaining tabs become available, and the data that matches the selection criteria is displayed in the Selection List window. A user may then highlight a role and click on the appropriate tab (Role Definition or Role Function) or click on one of the bottom buttons. The minimum required selection is department. A department <u>and</u> agency must be entered to select by role.<p>To define a new role, click on the New button, this will display the Role Definition window.</p><p><i>Continued</i></p> |

Define Roles**Reminders
(Continued)****Selection (Continued)**

To copy a role and its associated functions to another department or agency, click on the Copy To button. The Copy To button is activated when a Role is selected which then displays the Role Definition window. It is used whenever a similar role needs to be defined. For example, the timekeeper role for a central office timekeeper has specific functions that have been defined. The timekeeper role may be copied from another central office timekeeper for which the functions have already been modified. This saves time since the user does not have to modify the role to specify different functions that apply to that user.

To update roles for **all** the users that are assigned the role, click on the Refresh Roles for All button. When the role is refreshed, the functions (that are added or deleted) for the role are updated for all the users for which the role is assigned. To refresh a role for an **individual** employee, use the Refresh Roles button located on the Define User window.

- **Role Definition** - Allows agencies to define roles for their own needs as well as add, change or delete roles; however, they cannot make changes to the statewide default roles. The central agency defines roles on a statewide level and can only be modified by the Security Administrator at the central agency level.
- **Role Functions** - Allows functions to be added and removed from a role. Functions define the actions which can be performed by a user. For a timekeeper, the function could allow the timekeeper to update timesheets for their department, agency and TKU or just one level.

The central agency defines the start and end of when a function is available during the day. The central agency also defines the days on which the function will be available. In addition, the central agency may specify multiple effective start and end dates for each function. This function is accessible to security administrators at the central agency only.

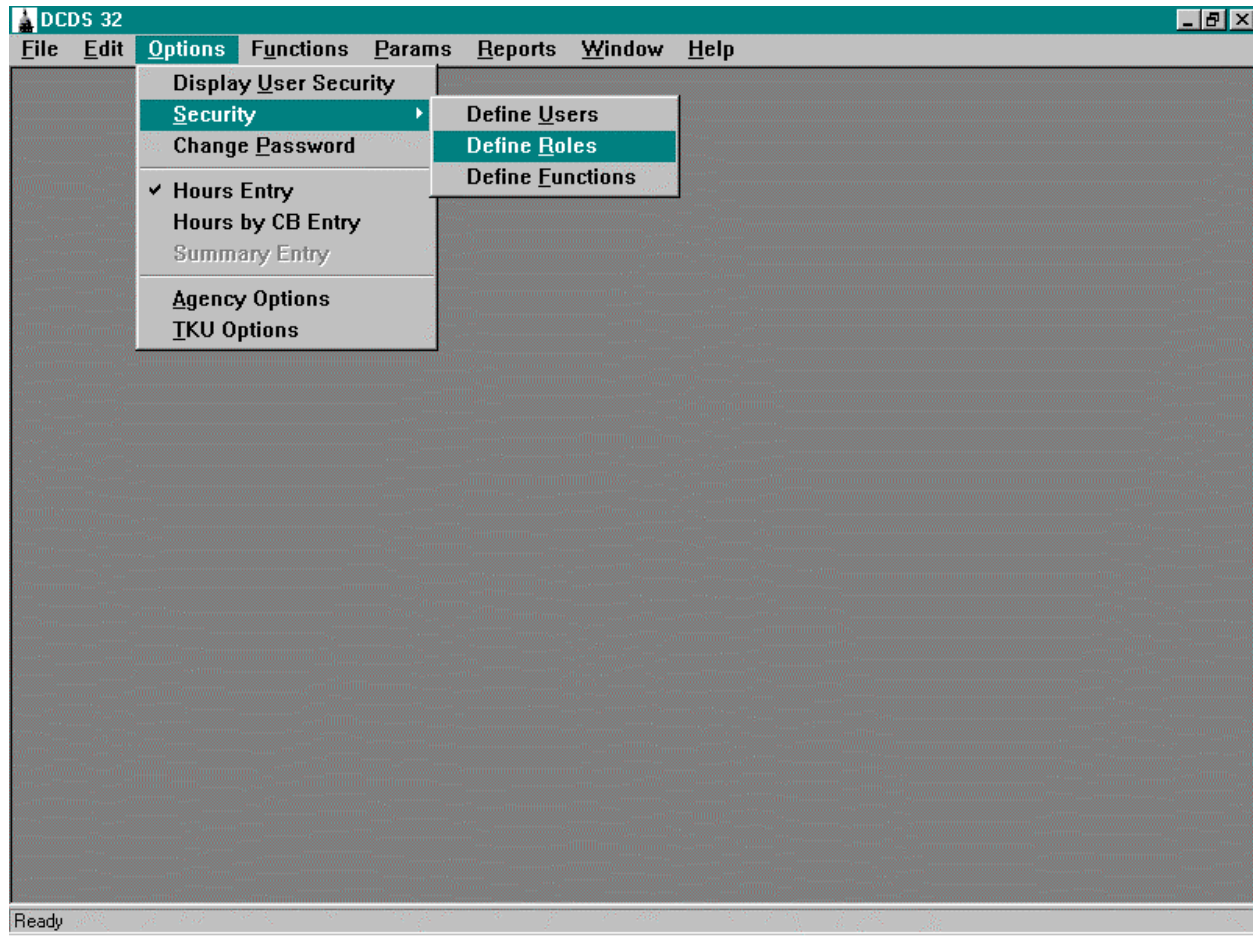
continued

Define Roles

| | |
|------------|---|
| Reminders | <p>Role Functions (<i>Continued</i>)</p> <p>When functions assigned to a role are changed or new functions are assigned to a role, users will not automatically get those functions. To do that the Department Security Administrator must ‘refresh’ the role.</p> <p>The scope for new function(s) default to the department, agency and TKU that the user is assigned. If a different scope is desired, the DSA must change and save the scope for the function(s) when the role is refreshed.</p> <p>3. For an explanation of errors/warnings associated with Define Roles <i>see Section 2.3.</i></p> |
| References | <i>No specific references</i> |

Main Menu

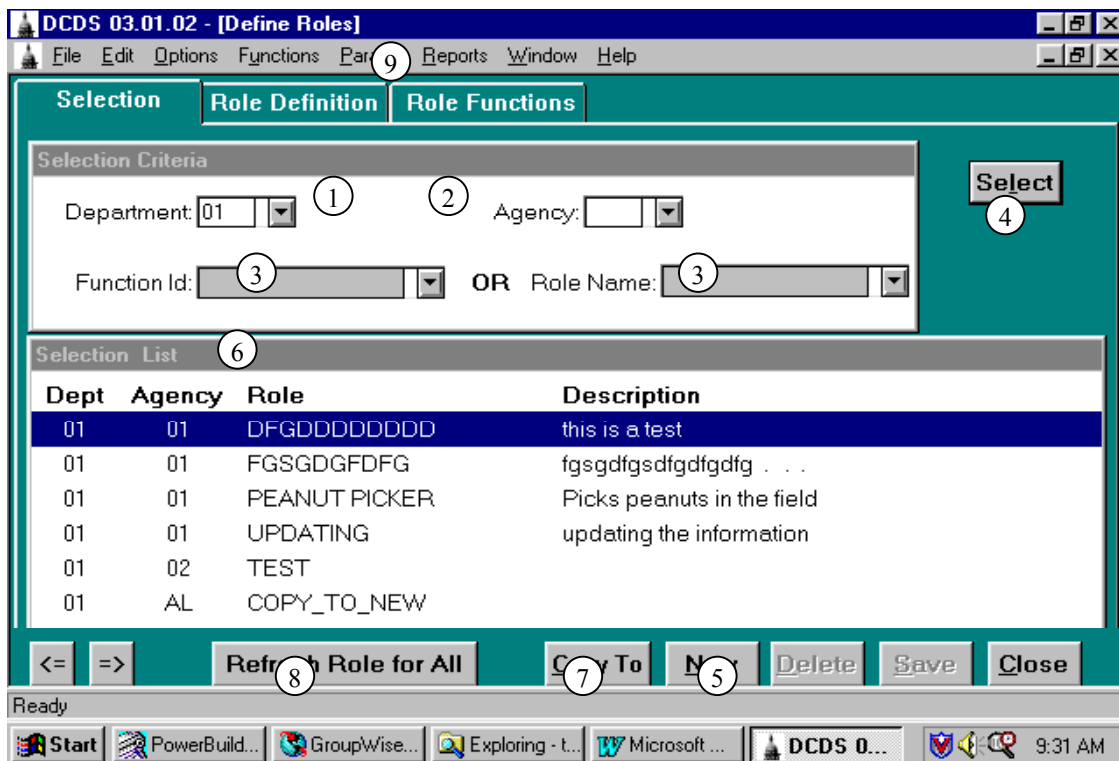
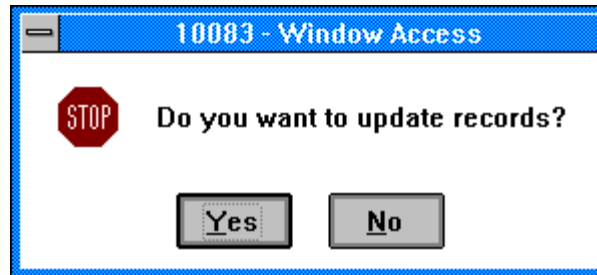
To define a user's roles, select the Options, Security, Define Roles items from the Menu bar.



Selection Tab

The following window is displayed when Options, Security, Define Roles is selected from the Menu bar. The steps are described on the following page.

Note: Before this window displays the following pop-up window appears. Click 'Yes' to continue and be able to make changes to data.



DCDS Input Procedures

Selection Tab (Selection Criteria)


Follow the steps below to select an existing role or add a new role:

| Step | Field Name | Action |
|--------------------|--------------------------|---|
| 1 | Department* | Select the appropriate department number from the dropdown list or enter the department number. |
| 2 | Agency | Select the appropriate agency number from the dropdown list or enter the agency number. |
| 3 | Role Name or Function ID | Select the appropriate role name or function ID from the dropdown lists. To select by role name or function ID, a department <u>and</u> agency must be selected. The Selection List window will start with the first role or function that matches the selected criteria. |
| 4 | Select button | Click on the Select button located in the top right hand corner of the window (or press Alt + L). A list of roles will appear in the Selection List window based on the selection criteria. |
| Add a Role | | |
| 5 | New button | To add a new role click on the New button (or press Alt + N). When the New button is selected, an empty Role Definition window is displayed. This window is used to enter the information required to create a new role. See instructions for the Role Definition tab to enter the information. |
| Copy a Role | | |
| 6 | Selection List Window | Highlight the user for which information is being copied from. |
| 7 | Copy To button | Click on the Copy To button (or press Alt + C). An empty User Definition window is displayed to enter information for the new user. See instructions for the Role Definition tab to enter the information. |

**indicates a required field that must be entered*

DCDS Input Procedures

Selection Tab (Selection Criteria)

| Step | Field Name | Action |
|-------------------------------------|------------------------------|--|
| <i>Refresh Roles for All</i> | | |
| 8 | Refresh Roles for All button | <p>The Refresh Roles for All button is used when functions assigned to a role are changed or a new function is assigned to the role. When the role is refreshed, the functions for the role are updated for all the users for which the role is assigned. To refresh a role for an individual employee, use the Refresh Roles button located on the Define User screen.</p> <p>To update a role for all the users, highlight the role in the Selected List window and click on the Refresh Roles for All button. A pop-up window displays to confirm that the role is refreshed. Click the OK button.</p>  <p>Note: The scope for the new function(s) will default to the department, agency, and TKU that the user is assigned. If a different scope is desired, the DSA must change the scope and save the scope for the function(s) when the role is refreshed.</p> |
| 9 | Tab | Click on the Role Definition tab to add a role or update the description of a role, or click on the Role Function tab to add or remove functions of a role. |

**indicates a required field that must be entered*

**DCDS Input Procedures
Selection Tab (Selection List)**

The following information is displayed:

| Field Name | Description |
|-------------------|---------------------------------|
| Dept | The department of the employee. |
| Agency | The agency of the employee. |
| Role | The title of the role. |
| Description | The description of the role. |

Role Definition Tab

The following window is displayed when the Role Definition tab is clicked, when the New button is clicked or when the Copy To button is clicked. For an existing role, this window displays the information previously entered for the role. The steps to add, update, delete or copy a role are described on the following page

DCDS

File Edit Options Functions Params Reports Window Help

Define Roles

Selection Role Definition Role Functions

Department 59 Agency 01 Role AGY ACTIVITY

Role Definition

Department 1 59

Agency 2 01

Role 3 AGY ACTIVITY

Description 4 Updates activity codes and units of measure for an agency.

Modified UserId: T_DEPT99

Modified Date: 08/27/96

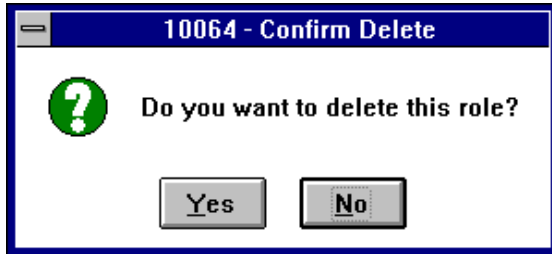
<=> Refresh Role for All Copy To New Delete Save Close

Ready

5 6

DCDS Input Procedures - Role Definition Tab

Follow the steps below to add, update, delete or copy a role:

| Step | Field Name | Action |
|------|--------------------|--|
| 1 | Department* | Enter the department number for the new role. Department number defaults based on security. |
| 2 | Agency* | Enter the agency number for the new role. |
| 3 | Role* | Enter the name of the new role (maximum of 15 characters). |
| 4 | Description | Enter or update the description of the new or existing role. |
| 5 | Delete button | <p>To delete a role, click on the Delete button (or press Alt + D). A pop-up window displays to verify the delete. Click the Yes button to delete the role or click the No button to cancel the action.</p>  <p>Note: A role can only be deleted from the Role Definition tab.</p> |
| 6 | Save button | Click on the Save button located at the bottom of the window (or press Alt + S) to save the new, copied or updated role. The new role or updates to an existing role are available for use immediately. |
| 7 | Role Functions Tab | Click on the Role Functions tab to add or delete functions to a role. |

**indicates a required field that must be entered*

Role Functions Tab

The following window is displayed when a role is highlighted on the Selection tab (or when a new role is added) and the Role Functions tab is selected. This window is provided to add or delete functions that are assigned to a role. The Functions Available to Role window displays all the functions available to the role. The user is able to define the scope for the functions in this window. The Default TKU Level column indicates the defaults at the timekeeping unit level for a function. The Default Org Level column is obsolete with implementation of the Human Resource Management Network (HRMN). When functions assigned to a role are changed, the roles must be refreshed. A role is refreshed by clicking on the Refresh Roles for All button. The button is only enabled from the Selection tab. The steps to add or delete a function to a role are described on the following page.

DCDS

File Edit Options Functions Params Reports Window Help

Define Roles

Selection Role Definition Role Functions

Department 59 Agency 01 Role AGY ACTIVITY

Function (1)

Change Password

Coding Block Crosswalk

Commodity Codes

Comp/Overtime Authorization

DC Adjustment

Data Collection: Equipment

Data Collection: Inventory

Data Collection: Modify

Deduction Code

Default Hours

Add/Rem

(2) (3) (4)

Functions Available to Role





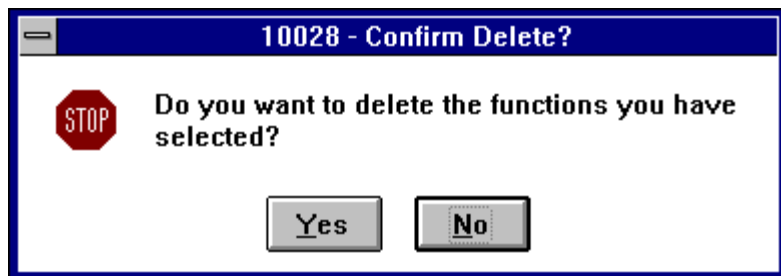
| Function | Default TKU Level | Default Org Level | Up Date |
|---------------------------|-------------------|-------------------|-------------------------------------|
| Agency Activity | TKU (5) | None (6) | |
| Agency Pay Type | Agency | None | <input checked="" type="checkbox"/> |
| Approval Window | TKU | None | <input checked="" type="checkbox"/> |
| Approval: Civil Service | TKU | None | <input checked="" type="checkbox"/> |
| Data Collection Window | TKU | None | <input checked="" type="checkbox"/> |
| Data Collection: Activity | None | None | <input checked="" type="checkbox"/> |
| Data Collection: Time | None | None | <input checked="" type="checkbox"/> |

Refresh Role for All **Copy To** **New** **Delete** **Save** **Close**

Ready (7)

DCDS Input Procedures - Role Functions Tab

Follow the steps below to update or delete functions assigned to a role:

| Step | Field Name | Action |
|--------------------------|---|--|
| Add a function | | |
| 1 | Function List | Highlight the Function(s) to be added to the role being defined. |
| 2 |  | The Add button allows the user to add the highlighted function(s) to the role being defined. If all functions listed are to be added, use the  (Add All) button. This button moves all the functions listed in the Function List window to the Functions Available to Role window. |
| Remove a function | | |
| 3 | Functions Available to Role window | Highlight the Function(s) to be removed from the role being defined. |
| 4 |  | <p>The Remove button allows the user to remove the highlighted function(s) from the role being defined. If all functions listed are to be removed, use the  (Remove All) button. This button moves all the Functions listed in the Functions Available to Role window back to the Functions List window.</p> <div data-bbox="602 1287 1378 1560">  </div> |

DCDS Input Procedures - Role Functions Tab

| Step | Field Name | Action |
|-------------|------------------------------------|--|
| 5 | Functions Available to Role window | The functions available display. The Default TKU is automatically defined when the role is assigned to users. Note: The Default Org Level is obsolete with implementation of the Human Resource Management Network (HRMN). |
| 6 | Update | Click on the box to add or delete update capabilities. A (✓) indicates updates can be made. No (✓) indicates inquiry capabilities only are allowed. |
| 7 | Save Button | Click on the Save button located at the bottom of the window (or press Alt + S) to save all changes made. The changes take effect immediately. |